

**EXHIBIT**

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6-7-05 DR

**H&R BLOCK****Performance Review**

Name:	Dre McCray	Review Period:	Fiscal Year 2002
Title:	Regional HR Manager	Date of Review:	May 15, 2002
Department:	Field HR_Region 10	HR Director:	Franciene Gill
Date of Hire:	August 20, 2001	Region Director:	Linda Murphy

☐ For new hires with start dates from October through December 2001, this evaluation serves as the 90-day evaluation.

The table below defines the ratings used:

Exceeds Expectations	Results consistently exceed position requirements and expectations. Competency is clearly above position requirements.
Meets +	Results consistently meet and often exceed position requirements and expectations. Competency is generally above position requirements.
Meets Expectations	Results consistently meet position requirements and expectations. Competency is appropriate for position requirements.
Meets -	Results meet most position requirements and expectations; however, performance needs to improve in areas identified. A developmental plan and/or corrective action form must be completed and administered with the review.
Does Not Meet Expectations	Results consistently do not meet position requirements and expectations. Performance clearly needs improvement in identified areas. A developmental plan and/or corrective action form must be completed and administered with the review.

**Part A: Review of Performance Objectives**

Record the status of any specific objectives established at the beginning of the review period. Any adjustments made to the objectives throughout the review period should be documented. Be sure to include specific comments regarding performance as it relates to these objectives.

Corporate Objective	Individual Objective	Target Dates	Results
Satisfied Associates: Foster an environment that Develops, Retains, and Attracts Well-Performing Associates.	1. Develop plan to demonstrate effective support to assigned Region.	Dec'01	Did not complete formal plan.
	2. Develop plan to Audit HR Paperwork in District Offices. All Districts should be completed within two tax seasons.	Apr'03	Audited 10 of 29 districts 3/31/02

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	3. Audit Regional Office personnel files. Note employment contracts and acknowledgements.	Apr'02	Completed Regional files Oct'01
	4. Deliver training for District Employment Assistants.	Dec'01	Deliver DEA training Nov'01. Participated in Single Point of Entry Pilot.
	5. Deliver Fair Employment Practices Training to Field Managers	Jan '02	Delivered classroom training for 231 of 232 of seasonal office managers by 12/31/01.
	6. Participate in a minimum of one Seasonal Orientation.	Dec '01	Plan changes from business owner extended classroom deliver for non-seasonal field managers to 12/31/02. Participated in one session Nov'01
	7. Provide support for Career Day activities	Mar '02	Region does not participate in Career Day activities.
	8. Complete DDI Certification.	Sep '01	Certified for DDI Sep'01
<b>Segmented Solutions:</b> Begin to Employ Client Segmentation in a Way That Delivers Appropriate Products and Services to the Right People at the Right Time in the Right Manner.			
<b>Client First:</b> Integrate Client-Centric Thinking Into All of Our Actions.			
<b>Integrate and Advise:</b> Integrate and Align Tax, e-solutions, Financial Advisors and Retail Mortgage,			
Incorporating Advise as a Key Differentiator.			
<b>Meet or Beat:</b> Meet or Exceed Our Short-Term Business and Financial Objectives.			

Develop and implement leadership processes that align the work of people throughout our organization.			
Individual Performance Objectives			

**Part B: Performance Dimensions**

Performance dimensions describe fundamental attributes of successful performance. Using specific examples of performance and behavior, record comments and determine a rating for each performance dimension. Up to four performance dimensions should be identified as key. The key dimension box should be marked with an "X". The Supervision/Leadership performance dimension will always be a key dimension for associates with supervisory responsibility. When the Supervision/Leadership dimension is not applicable to a job, the supervisor should check the Not Applicable box in that section.

Key Dimension ☒**Knowledge and Job Skill**

Consider the amount of job knowledge and skills the individual possesses and how well those skills are utilized to perform job duties in a competent manner. Consider the extent to which the associate learns from experiences and applies lessons learned to future issues and situations. Also, consider the willingness of the associate to maintain knowledge and skills and to upgrade skills to meet changing job needs.

Rating:

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

Dre has a basis academic understanding of human resources practices and employment law. With additional HR experience and a broader understanding of tax and financial services he will be able to balance HR requirements and business needs. Dre's strength is his recruiting skills. He has conducted recruiting for tax operations and HRBFA. Both directors have been satisfied with the quality of the candidates that he has referred to them for interviews. Dre understands that he has limited experience in handling associate relations issues; as such he will not hesitate to seek guidance when appropriate. He will offer advice but will not make a decision until he is certain it is appropriate.

Key Dimension ☒**Accuracy of Work**

Consider the quality, accuracy and dependability of work produced by the associate in meeting objectives. Also consider the approach taken by the associate when errors in work do occur and how effectively they are dealt with so as to eliminate them in future work. Consider compliance with policies, procedures and instructions in performance of job duties. Consider the professionalism of content and appearance of written work.

Rating:

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

Dre demonstrates a strong commitment to quality in his work. He is thorough and accurate and is always willing to receive feedback to improve upon his work. Dre has a strong grasp of numerical concepts. His region participated in the pilot for tax professional compensation. Dre understood the program very quickly was able to act as a resource to the other HR managers.

As of 3/9/02 Dre submitted a total of 21 PAFs with a 24%% exception rate. This rate is above the 5% acceptable range. Dre is accountable for PAFs submitted regardless of who submits for him.

Key Dimension ☒**Planning/ Organizing/Dependability**

Consider the ability of the associate to keep up with normal job duties and to manage time so that nearly all deadlines are met. Consider the ability of the associate to set and observe priorities and to allocate resources so that tasks are accomplished within budget limitations. Also consider the ability of the associate to maintain acceptable punctuality and attendance.

Rating:

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments:

Dre is diligent about meeting his goal and objectives. He was the first HR manager to deliver Fair Employment Practices training in his region. Region 10 had 97% participation of all office managers. Although Dre did not obtain written evaluations from the participants, some of the district managers provided positive comments regarding his presentations. Dre maintains organized files and can retrieve information quickly.

Dre's monthly reports and other projects are submitted within the appropriate timeframe to WHQ HR. He is less timely with entering this Clarify cases. February's monthly report indicated that only three cases have been entered into Clarify. That number does not reflect the number of investigations that Dre has conducted.

Dre must make a greater effort to be on time. Additionally, there have been several instances where Dre has requested time off for personal reasons with short notice to the regional office. Nor would he notify WHQ HR of his absence. We expect from time to time a need to make modifications to his schedule; however, Dre needs to discuss the changes in advance on a weekly basis to provide as much notice as possible.

Key Dimension ☒

Initiative  
Consider the extent to which the associate works to accomplish goals set by self or others until they are achieved or attainment is no longer reasonable. Consider the willingness with which the associate goes about all job tasks without follow up or urging and the extent to which the associate takes positive and effective actions or makes useful suggestions to improve customer service, quality, efficiency.

Rating:

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments:

While Dre is able to meet his current responsibilities, there are additional ways in which he could contribute to the region. Given a task he will work diligently to complete it. Yet he has not reached out to look for new challenges to support the regional directors of both tax and financial services. He should take a greater role in identifying ways to provide greater support to his region and make recommendations to the directors.

Key Dimension ☒

## Communication/Positive Working Relationships

Consider the ability of the associate to express himself/herself clearly and in an organized manner. Consider the demonstrated ability of the associate to communicate effectively (orally and in writing), to listen effectively and to respond appropriately based on feedback or instructions. Consider the associate's demonstrated ability to deliver difficult messages diplomatically. Consider the extent to which the individual has demonstrated the ability to work as a member of a team and willingness to assist others when appropriate. Consider the extent to which the associate uses appropriate interpersonal styles and communication methods to work effectively with business associates (peers, subordinates, supervisors, teammates, associates in other departments or business units, and external vendors). Consider the manner in which coaching/feedback is offered and accepted by the associate. Consider the extent to which the associate provides others, including the supervisor, with information of mutual concern.

Rating:

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments:

Dre has some development opportunities in this area. To date Dre's interaction with field management team has been primarily be disciplinary actions. His approach is sometimes viewed as inflexible or rigid. This has hampered his opportunity to be an effective coach and skill builder as the team is cautious about seeking him out for advice. Dre should also volunteer to share his ideas and offer to help others in the region office more often.

In Dre participation with the other HR managers has been very vocal about his opinions regarding various issues. Many of his opinions centered on "what's best for Dre". This became a rather annoying occurrence among the managers. However, when Dre was confronted with this feedback he put forth considerable effort to change his behavior.

Dre communicates well with others. He can organize his thoughts and express himself in a clear



understandable manner. He uses language that his audience will understand. Where verbal communication is one of Dre's strength he can be very out spoken and opinionated. He is aware of this development opportunity and is open to feedback.

Dre appears to have some challenges in delivering thorough concise written reports. It is not because he is not capable rather writing is not a task he enjoys. His monthly reports provided limited information until he was advised that the reports were unacceptable. He generally will not submit a written summary of an investigation to WHQ unless directed to do so. We will establish appropriate objectives to address this area.

Key Dimension ☒

### Decision Making

Consider the demonstrated ability of the associate to determine when a decision needs to be made, what issue needs to be decided, and who should be responsible for the decision. Consider, if applicable, the degree of willingness to provide decision making authority and task responsibilities to subordinates and utilize subordinates' time, skills and potential effectively. Evaluate the associate's ability to gather and analyze information relevant to the decision made. Consider the associate's ability and willingness to assess and take reasonable risks and to adequately communicate and implement decisions on a timely basis.

Rating:

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

Dre is able to sort through the complexities of an issue. He uses his experience to separate critical facts from less important information. Dre uses sound and consistent judgment when analyzing situations. He is an alert learner and uses each experience to guide him. If Dre is uncertain of a decision he will seek appropriate advice.

### Supervision/Leadership

Key Dimension ☐  
Not Applicable ☒

Consider the extent to which the associate maintains awareness of job-related matters in areas of responsibility and provides complete information and clear direction to subordinates. Consider demonstrated willingness to continuously seek opportunities for different and innovative approaches to addressing problems and opportunities. Consider the associate's efforts in attracting, retaining and developing organizational talent. Consider the apparent willingness to assist subordinates when requested and to facilitate subordinate development. Consider the extent to which balanced, timely, specific performance feedback is regularly provided to subordinates. Evaluate the quality and timeliness of formal performance reviews.

Rating:

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

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**C: Overall Rating**

The overall rating is an assessment of performance for the entire review period. When determining the overall rating, the supervisor should give more weight to those performance dimensions marked as a "Key Dimension" (three Meets + and three Meets and all three of the Meets + are Key Dimensions, you should consider a Meets + rating). If the overall rating is a "Meets Expectations -" or "Does Not Meet Expectations", a development plan and/or corrective action form must be completed and administered with the review. The development plan or corrective action forms should have a specific date to review progress and determine next steps in the associate's performance development.

Exceeds Expectations	Meets Expectations +	Meets Expectations	Meets Expectations -	Does Not Meet Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Part D: Overall Narrative**

The overall narrative should include significant accomplishments; identify any areas for improvement and outline developmental progress. Comments and examples of overall performance are recommended. Comments are required when an associate's overall rating is other than Meets Expectations.

Dre has provided significant assistance to Region's 10 field management with associate relations issues during his first tax season. He will be able to provide greater support when he gains a greater understanding of tax and financial services. Dre must take a more proactive role in identifying and assessing the needs of the region. He will be expected to develop the leadership skills of field management. Dre should continue to build relationships with district managers so they are open to his coaching.

Dre has demonstrated his ability to:

- learn and adapt quickly
- Work with minimum supervision
- Communicate effectively
- Be open to feedback

Dre must focus on:

- Written communication skills
- Act as a team player
- Listen and respond appropriately
- Reporting absences more timely

**Comments from Second Level Manager**

The second level manager must sign the review and have an opportunity to add comments before the review discussion is held with the associate.

As you know, I work in the same office with Dre McCray. It has been very beneficial. He is always helpful when needed and proactive on issues we need to improve. I look forward to continuing our working relationship to make this an even better place to work.

Steve Belloli  
Vice President  
North Atlantic Regional Manager  
H & R Block Financial Advisors

**Associate Comments**

In the space provided (and on separate sheets if needed), the associate is invited to make comments regarding the review.

I have reviewed this evaluation and have discussed its contents with my supervisor.

*refused to sign 8/21/02* \_\_\_\_\_ Date  
Associate Signature

*[Signature]* \_\_\_\_\_ 8/21/02 Date  
Supervisor Signature

*Francene Gill* \_\_\_\_\_ 8/21/02 Date  
Second Level Management Signature

Attachments: No ☐ Yes ☐

To be completed by the second level manager after the delivery of performance evaluation.

\_\_\_\_\_  
Second Level Management Signature Date